

How To...

Work With Other Applications

The Key provides the ability to link to a number of external applications. These can be for the purpose of sourcing products, both mortgage and insurance, as well as supporting applications which include the ability to send text messages via the Key, e-mail, diary integration and conveyancing.

All of these integration links are located in the Setup>Integration area of the left navigation menu. From that screen the specific area to be amended can be accessed.

Configuring Mortgage Sourcing System Links

The Key can integrate with either Mortgage Brain (either MortgageBrain Classic, MortgageBrain Anywhere or both) or Trigold for mortgage sourcing.

To set up the links:

- Click on Setup>Integration in the left navigation menu.
- Select the 'Local PC Settings' tab. The following screen is displayed:

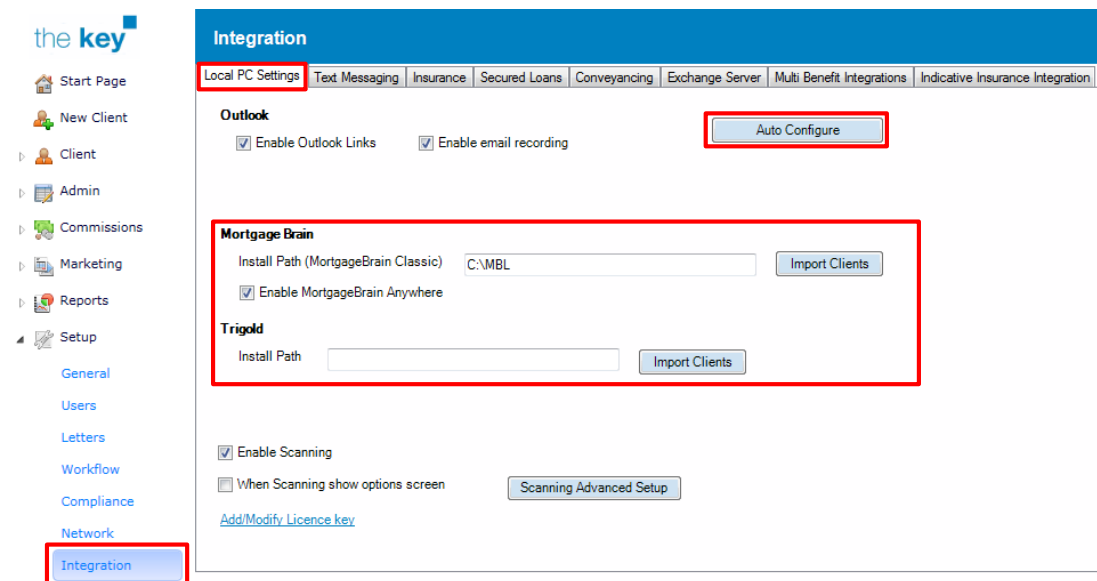


Figure 1: Setting Up Sourcing Integrations

- If using Mortgage Brain enter the installation path in the appropriate field. This is normally C:\MBL
- If using Trigold enter the installation path in the appropriate field.
- Note that clicking on the 'Auto Configure' button the Key will search that computer for installed applications and, if present, insert the appropriate data in these fields.
- Once the correct application path has been entered, it will be possible to launch Mortgage Brain and/or Trigold from the fact find, or within Product Details if required.

Configuring E-mail and/or Exchange Server Settings

The Key can integrate with Outlook to send e-mail directly from within the application (keeping a copy of the mail within the appropriate documents area) as well as checking incoming mails to identify associated replies to add to the Key. Support is also present for those firms using a Microsoft Exchange server.

Configuring Outlook integration

- Click on Setup> Integration in the left navigation menu.
- Select the 'Local PC Settings' tab. The following screen is displayed:

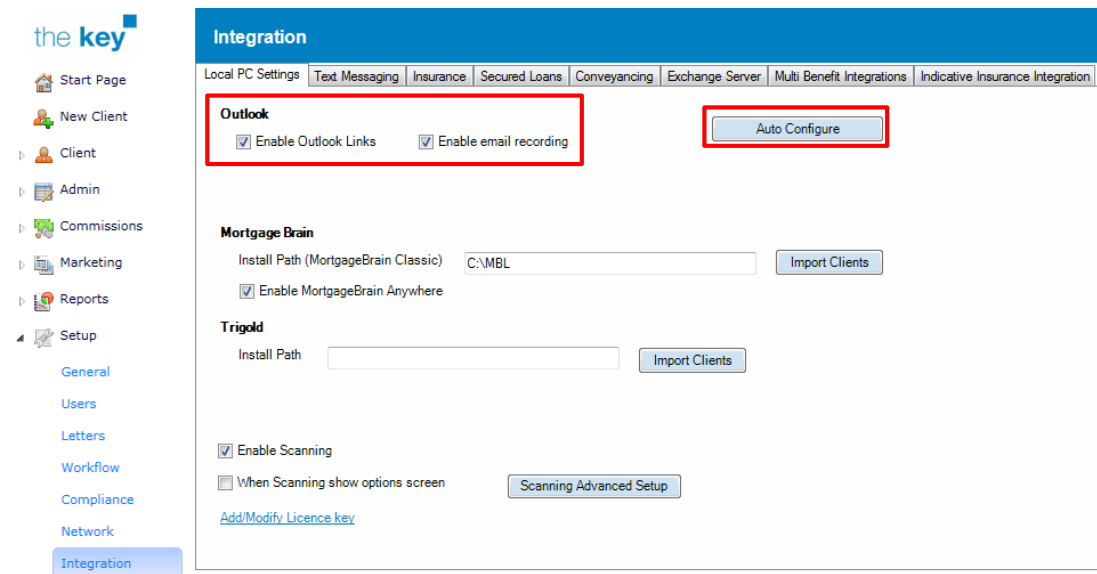


Figure 2: Outlook integration screen

- Under the Outlook heading, place a tick next to 'Enable Outlook Links' to enable access to that computer's copy of Outlook for sending e-mails and diary access.
- Place a tick next to 'Enable email recording' to check e-mails received on that computer's copy of Outlook for replies to mails sent from within the Key.
- Note that clicking the 'Auto Configure' button will automatically place a tick in Enable Outlook links if Outlook is installed on that computer.

Configuring Exchange Server Settings

- Click on Setup> Integration in the left navigation menu.
- Select the 'Exchange Server' tab. The following screen is displayed:

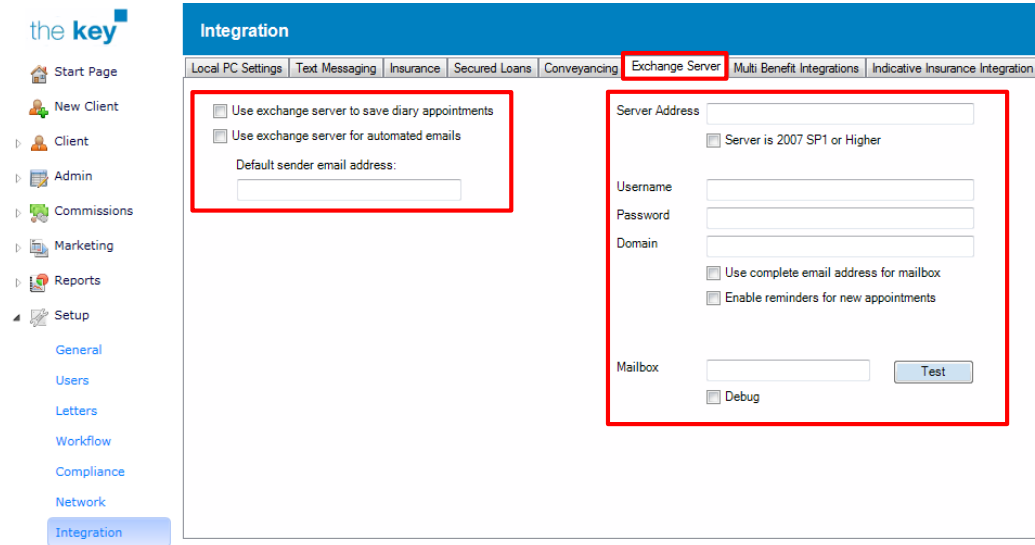


Figure 3: Exchange Server settings

- Place a tick to confirm that the Exchange Server is to be used for managing diary appointments within the Key.
- Complete the details of the Exchange Server settings. Note some assistance might be required from an IT system administrator if the required details are not known by the user.

Configuring Insurance Sourcing System Links

The Key integrates with a number of third parties for the production of comparative and single company quotes for a variety of insurance products. Only those applications indicated within the setup area are available, if multiple options are available the user will be presented with a list of options from which to select the required option.

It is possible to record a user's login details within their user profile to automatically login to supported integrations. See 'How to Setup User Profiles within the Key' for further information.

- Click on Setup>Integration in the left navigation menu.
- Select the 'Insurance' tab. The following screen is displayed:

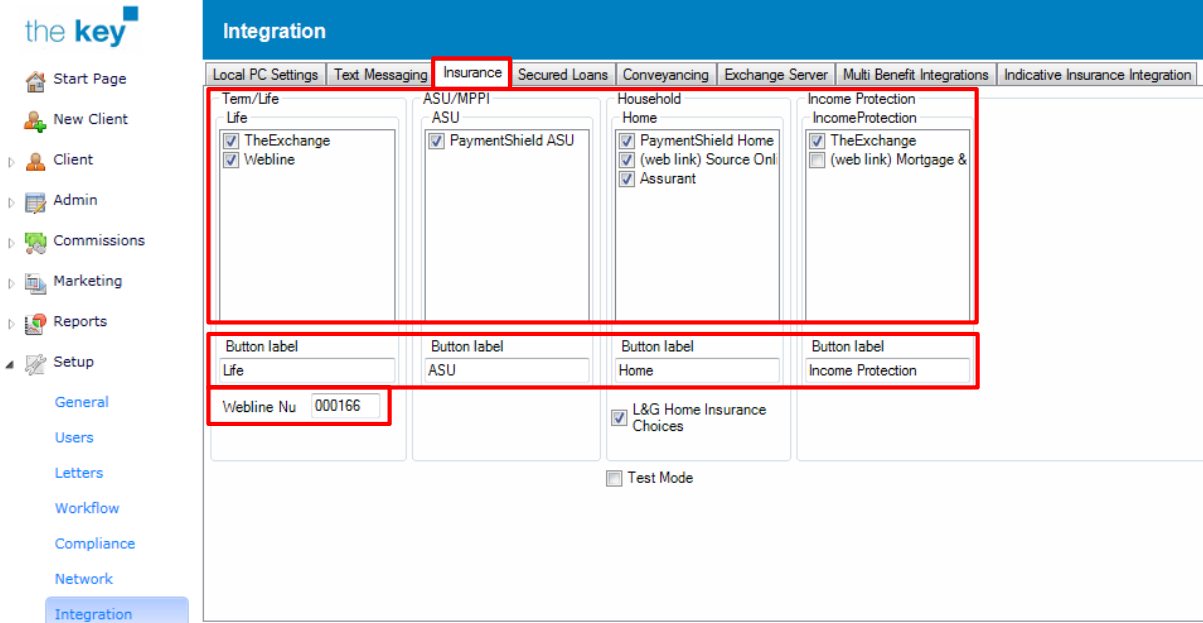


Figure 4: Insurance integration settings

- Within this tab, for each of the product criteria of Term/Life, ASU/MPP/ASU, Household and Income Protection select the 3rd party application that is to be used. Note that those that require a specific installation on a computer (as opposed to a web based service) must already be installed in order to work.
- *Webline*: *Webline* uses a company identification number in addition to individual login information. This number should be entered in this screen.
- The label displayed on the button in the fact find or Product Details window can also be configured here to reflect individual company needs.

Configuring Conveyancing System Links

- Click on Setup>Integration in the left navigation menu.
- Select the 'Conveyancing' tab. The following screen is displayed:

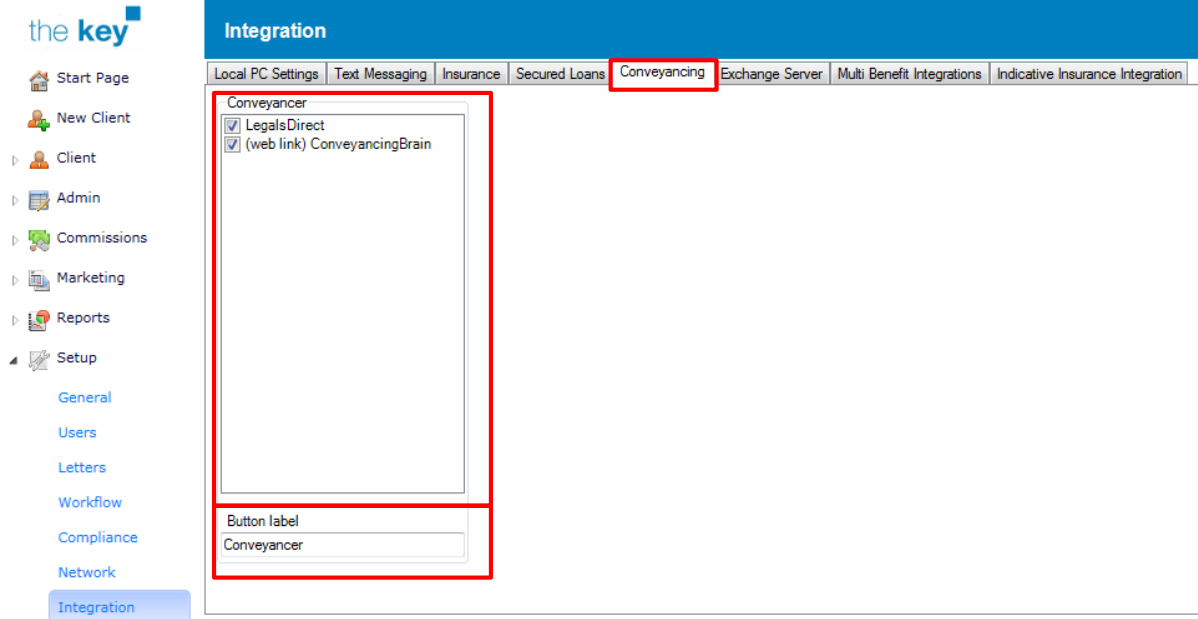


Figure 5: Conveyancing settings

- The label used for the Conveyancing button can be amended if required
- The Conveyancing button will appear within the Fact Find>New Mortgage screen, under the Property tab. It will also appear within the Product Details screen.

Configuring Secured Loan System Links

- Click on Setup>Integration in the left navigation menu.
- Select the 'Secured Loans' tab. The following screen is displayed:

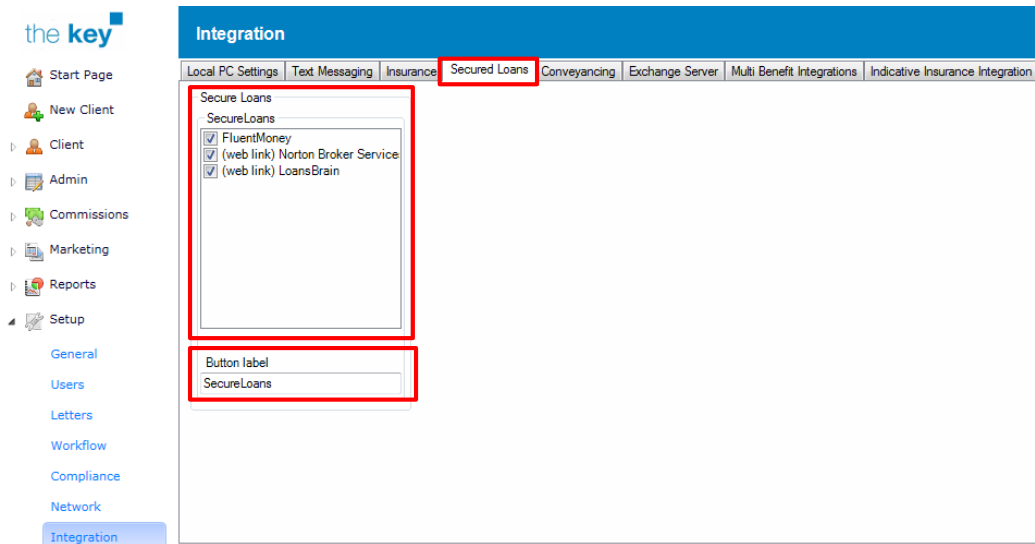


Figure 6: Secured Loan integration settings

- The label used for the Secured Loans button can be amended if required. This button is only available from the fact find.

Configuring Text Messaging Functionality

The ability to send text messages from within the Key is dependent upon the user having an account with TextAnywhere (www.textanywhere.net). A number of accounts are available either on a pre-paid or account basis. Once set up, the account information can be entered in the Key and the ability to send text messages is automatically enabled.

- Click on Setup>Integration in the left navigation menu.
- Select the 'Text Messaging' tab. The following screen is displayed:

The screenshot shows the 'Integration' settings page. The 'Text Messaging' tab is active. Under the 'Text Messaging' section, the 'TextAnywhere' radio button is selected, with a link to 'textanywhere.net Open Account'. Below this, there are three input fields: 'Client_ID', 'Client_Pass', and 'Originator', each with a corresponding text box. A 'Test' button is located to the right of the 'Originator' field.

Figure 7: Text messaging integration settings

- Select TextAnywhere. Links are provided to the company's website.
- Enter the 'Client_ID' in the top box. This is provided by textanywhere.
- Enter the 'Client_Pass' in the middle box. This is the password supplied by textanywhere.
- Enter the 'Originator' in the lower box. This is to specify where messages sent from the Key will appear to originate from for the recipient.
- To test the details, click on the 'Test' button and enter a mobile number when prompted. This will send a test message to the entered number.

Configuring Multi Benefit Functionality

- Click on Setup>Integration in the left navigation menu
- Select the Multi Benefit Integrations tab. The following screen is displayed:

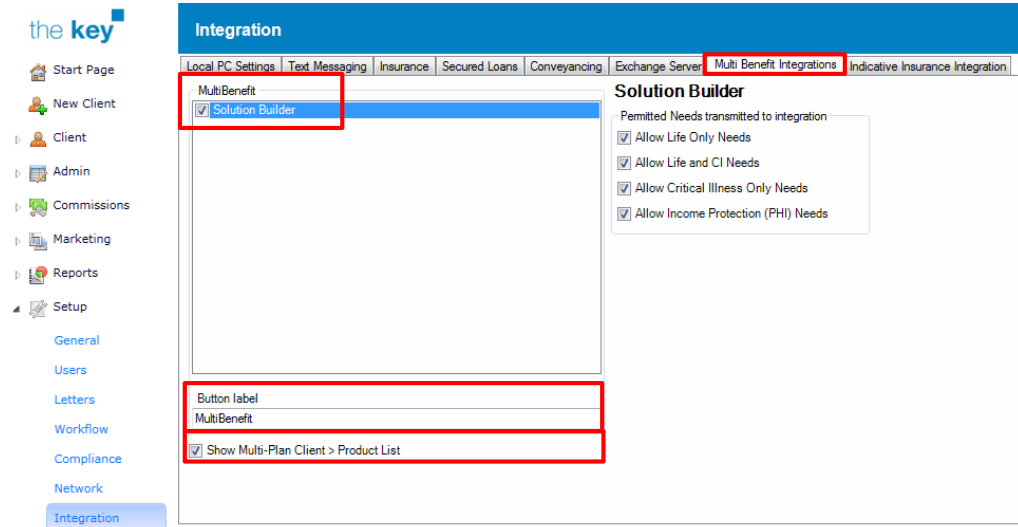


Figure 8: Multi Benefit integration settings

- Select the MultiBenefit integration to use; at present only SolutionBuilder is available
- Select which insurance needs are to be passed through to SolutionBuilder
 - Usually all options will be selected
- Confirm the label that will be presented on the button to launch the integration from the Fact Find>Insurance>Cover Required screen
 - This will default to MultiBenefit
- Confirm whether the new Product List is to be used
 - This makes multi benefit products easier to review, but does not offer the customisation of the existing Products screen

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